



“Print-to-FileHold” “AutoTagging” and “Auto-Filing” Features

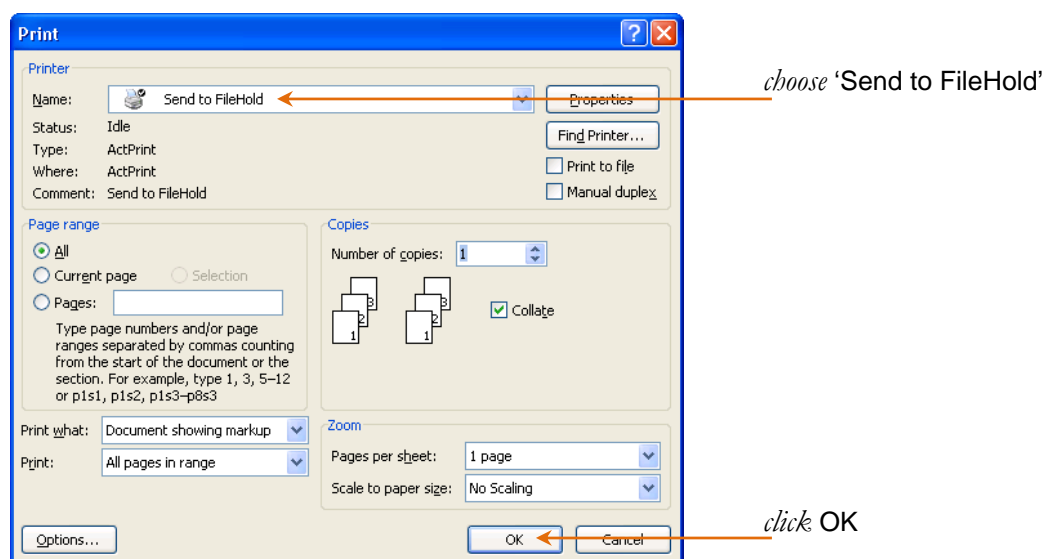
Introduction

The FileHold document repository is a place to store and protect a company’s intellectual property. Once inside the repository documents are secure, version controlled and easy to work with. Users are assigned highly secure rights to “read only” or work with documents in a variety of ways. FileHold software provides many ways to add documents to FileHold; “drag and drop” from My Documents, direct addition from Office applications such as Word and Excel, importation from Email and several interfaces to support document scanning and imaging. For more advanced needs, FileHold has advanced tools for mass importation from file shares or other document storage applications.

This White Paper briefly explains the “Print-to-FileHold” (PTF) functionality and the complimenting AutoTagging and Auto-Filing technologies. PTF is an automated way to get documents into the FileHold library from any 3rd party application that supports the ability to print a document. PTF eliminates the need to print documents and then scan to store them electronically; this saves organizations time, paper and money.

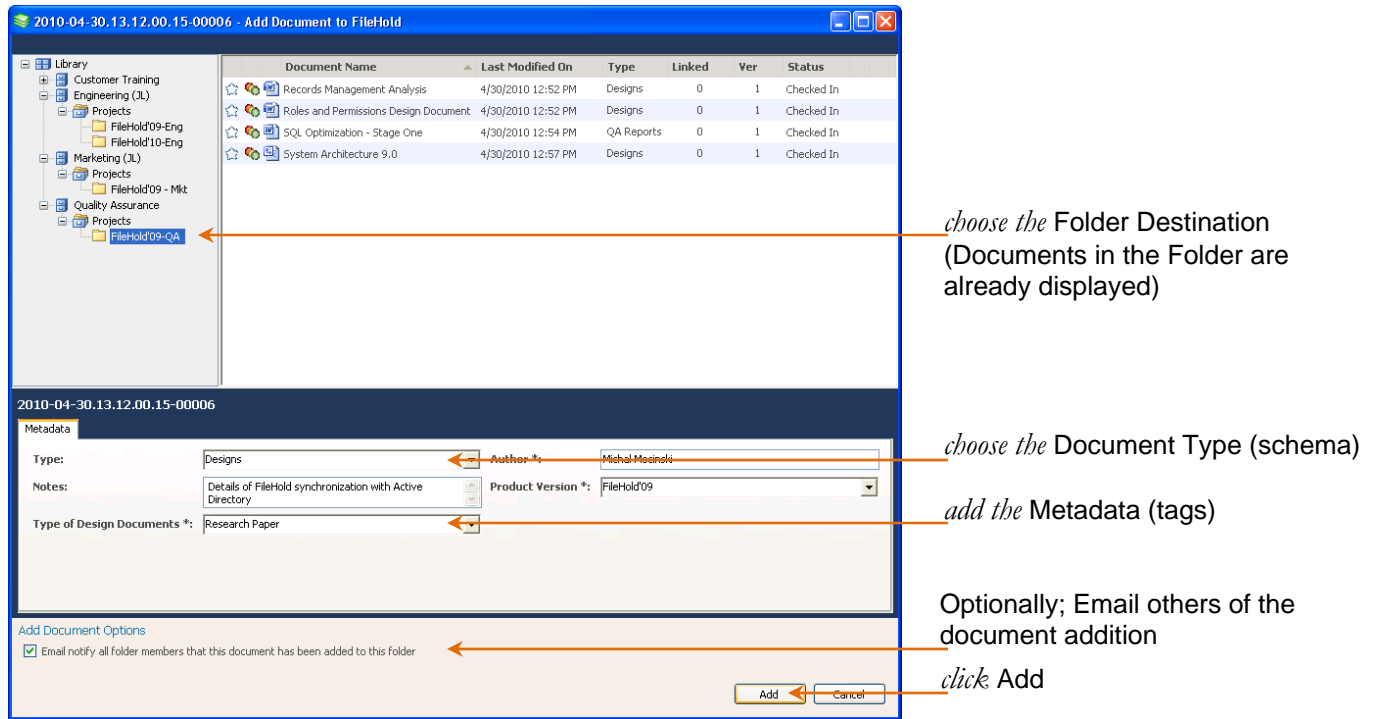
Print-to-FileHold (PTF)

The PTF software is installed on a desktop computer running the 3rd party application that is creating the documents. (i.e. Accounting, HR or CRM). When the user wants to send a document from a 3rd party application to be stored on the FileHold server / repository they initiate their normal print function. The user is shown a list of printers to choose from; selects the “Send to FileHold” option and approves the print (Send to FileHold can be set as the default).



As the print process initiates; an: “Add Document to FileHold” dialog box is automatically displayed and a popping sound is heard to confirm the document is ready to “Add to FileHold”. The user highlights a folder destination from the FileHold library tree on the left side of this dialogue box which will display the other documents already in this folder; this allows the user an opportunity to visually confirm, that indeed, this folder is where they actually want to store the new document.

Highlighting the folder will also automatically display, at the bottom of the dialogue box, the default Document Type (schema) of the folder. This default Document Type can be used or a different one chosen. Based on the Document Type the metadata values (tags) are filled in. When completed; the “Add” button is clicked and the document is correctly and securely added to the FileHold System. The document is automatically deleted from the temporary location and the dialog box is closed.



Only one dialog box is displayed at a time, so if multiple files are printed at the same time, a second dialog will appear once the first one is confirmed. Destination and metadata is provided separately for each document.

As an additional benefit, the document is converted to PDF so that it can be fully OCR enabled making it full text searchable by the powerful FileHold standard or advanced search tool. PDF is a more compressed form in which to save documents and saves storage space.

Print-to-FileHold is an ideal application for an accounting department that sends out invoices electronically but would like to have an image of the invoice (along with other pertinent contract information) in a central repository.

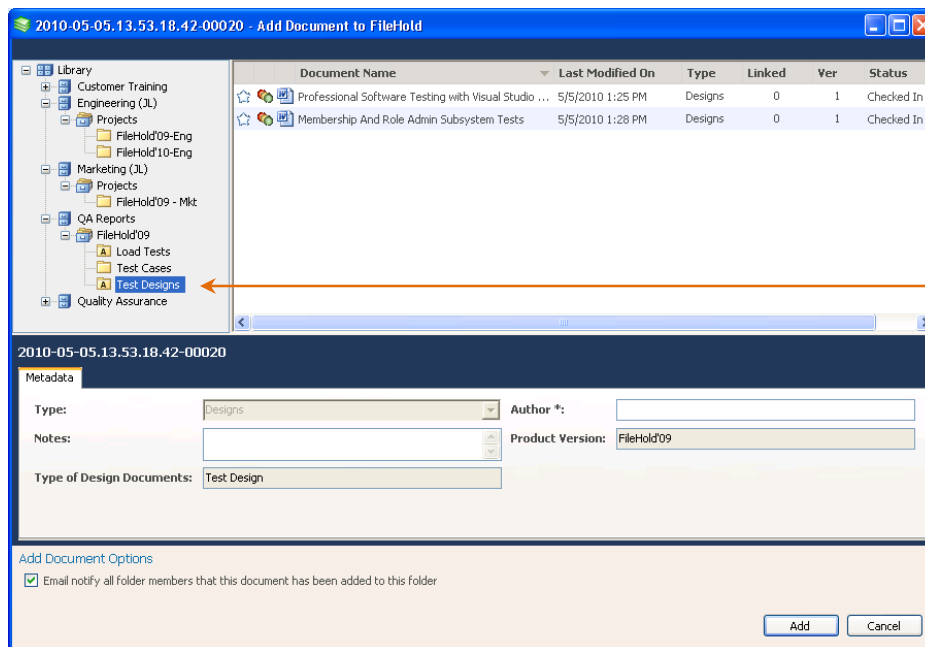
PTF is an optional feature that has a onetime licensing charge of \$2,000.00. The fee includes an unlimited use license key that activates the feature and up to 4 hours of support / training time to assist with the first implementations (registry setup etc.). The installation and global configuration is very easy; FileHold just wants to ensure customers have a positive and successful install experience.

AutoTagging

“Tagging” is the act of attaching key descriptive words to documents so that they can easily be found at a later date. In document management software this “data about data” is referred to as Metadata and gives users a very powerful tool to store and recover documents without the need for complex library trees or hierarchal storage systems.

The PTF feature can be used in combination with the AutoTagging feature in FileHold (sometimes called “matter centric filing”). AutoTagging assumes that the document being added to a folder is the same Document Type (schema) and has all (or most of) the same metadata as the other documents in the folder. The metadata options are highly configurable and can be set to require users to complete certain fields before filing. This ensures a highly compliant filing system and standardization across all users. Users can select to have some standard repetitive metadata added automatically, add some manually or a combination of both.

An AutoTagging folder can be identified by the letter “A” on the folder. The user simply selects the AutoTagging folder and drags the document into it or clicks on the “Add” button and the document along with the pre-set metadata is added to FileHold.



Auto Tagging Folder
is marked with “A”

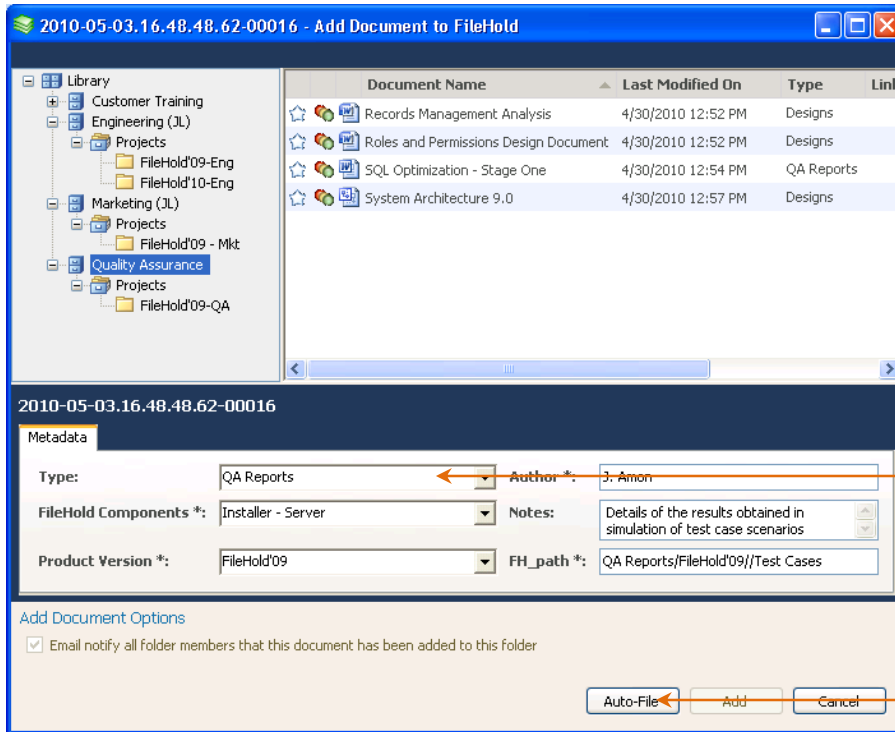
Auto-Filing

For customers who have similar and repetitive documents they are adding to FileHold and want to go even further in automating the filing process the FileHold professional service team can add Support for Auto-Filing. To learn even more about Auto-Filing go to <http://www.filehold.com>

The cost of this option is determined after a consultation to determine the complexity of the filing process.

Based on the metadata (tags) assigned to the document and an algorithm built into the Auto-Filing script, FileHold intelligently determines the location (folder) where a document should be stored and the document is automatically added to the folder. If an appropriate folder (or entire path for that matter) cannot be found the folder path and folder is automatically created by the Auto-Filing script and the document is filed.

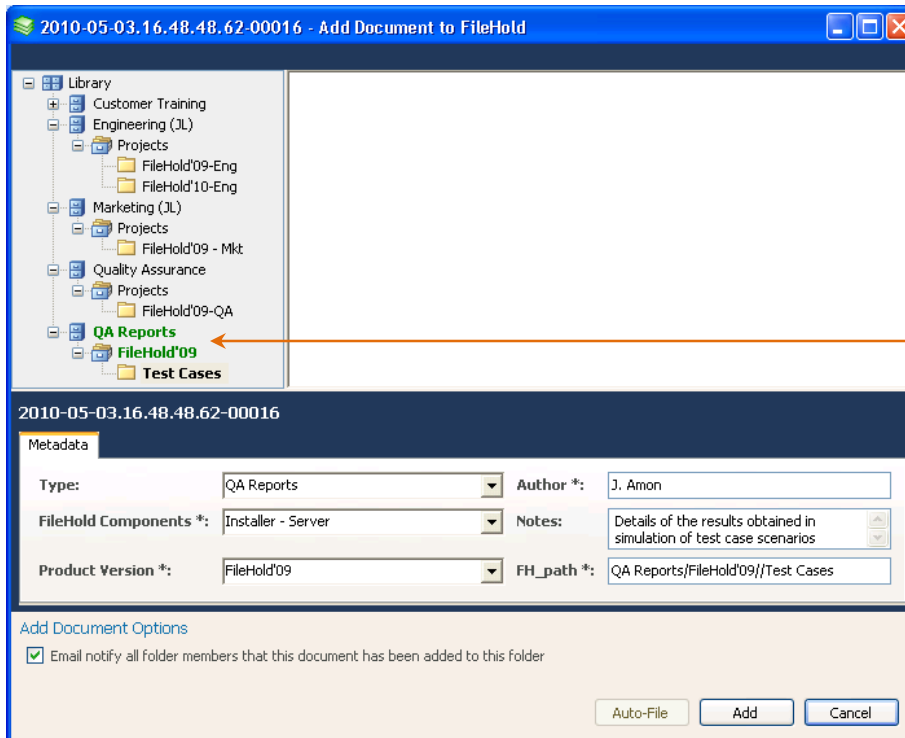
Once the FileHold Professional services team has created the Auto-Filing the user can select a Document Type (schema) with an associated Auto-Filing script attached to it. Now an “Auto-File” button will appear in the bottom part of the dialog box.



choose the Document Type (schema) with auto filing

click Auto-File

After providing the required metadata values and clicking the “Auto-File” button the appropriate target folder will be automatically selected in the library tree on the left. If the target folder does not exist it will be created and upon upload it will appear in the tree in a dark green color. The dialogue box below shows a new Cabinet / Drawer and Folder that has been automatically created.



New Cabinet/Drawer and Folder have been automatically created

If necessary, the user can modify the metadata values and click the “Auto-File” button again to correct the destination. The user is allowed to cancel (override) Auto-Filing by manually selecting a different folder from the library tree.

The Auto-Filing script will also assign the appropriate security rights (membership) of users / groups to the Cabinet and Folder in this path. This ensures that once the path is created the appropriate rights to be able to access the imported document will be automatically given to the correct users or groups of users.

Print-to-FileHold Configuration Options

A range of configuration options related to the output format and file security can be set up as a part of the installation process. This is done programmatically in the registry as a part of the FileHold Professional Services during implementation. The available options include:

Registry Value Name	Value
OutputFormat	specify file export format (PDF, EMF)
PDFCompressContent	compress PDF content
PDFCompressImages	compress images within PDF file
PDFEmbedFont	Embed fonts into output file
PDFEncryption	Use PDF encryption
PDFPassUser	The user password for the PDF document
PDFPassOwner	The owner or master password for the PDF document
PDFPermPrint	Permit the user to print the PDF document
PDFPermCopy	Permit the user to copy text and graphics from the PDF document
PDFPermEdit	Permit the user to edit the PDF document
PDFPermAddNotes	Permit the user to add annotations
PDFPermFillFields	Permit the user to fill in form fields
PDFPermCopyAccess	Permit copying for use with accessibility features
PDFPermPrintFull	Enable High-Resolution Printing
PDFPermAssemble	Permit the user to assemble the PDF document